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ABSTRACT

The main reason for the establishment of American-Sponsored Overseas Schools (ASOS) was to offer the dependents of Americans living abroad educational opportunities similar to what was available at home. ASOS have several general characteristics, including being privately controlled, nonprofit, nonsectarian, and American or binational in character. Changing enrollment, professional turnover, a high degree of autonomy, and shifting funding patterns have affected the ability of ASOS to use rational planning. The most serious problems in the ASOS planning base are a lack of information about relative school status, lack of clear direction, and lack of a designated strategy. The concluding section examines the applicability of several major planning models to problems faced by ASOS in Latin America. (16 references) (EJS)

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A PLANNING MODEL FOR AMERICAN-SPONSORED OVERSEAS SCHOOLS

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Introduction

The availability of adequate schooling for dependents of citizens living abroad is a crucial concern for almost every government and corporation which maintains employees outside of their own country. While some larger government organizations and corporations establish dependent schools for their overseas personnel, most find it more feasible and cost-effective to enroll dependent children in the nearest international school.

American-type schools operating overseas can generally be classified as United States Department of Defense Dependent Schools (DODDS), American-Sponsored Overseas Schools (ASOS), church-related schools, and company schools (Patterson, 1978). Although reliable world-wide enrollment statistics are not available for church-related and company schools, the great majority of American dependents are enrolled in either the DODDS system or ASOS.

The DODDS system, established in the early 1800s and consolidated into one system by act of Congress in 1976, constitutes the largest single group of American dependent school children abroad. Reaching an estimated high of 180,800 students enrolled during the mid-1960s (Mannino & Connor, 1966), the Personnel Division of the DODDS currently reports world-wide enrollment to total 153,564 (U.S. Department of Defense, 1990).

American-Sponsored Overseas Schools

Historical Overview

Perhaps Luebke (1976) best summarized the origins and purposes of American-Sponsored Overseas Schools when he said:

> Historically, Americans abroad have chosen to establish and operate community schools wherever they have been stationed rather than to send their children away for their education. In 1888 -- United States citizens living in Mexico City established their own school in order to offer their children educational opportunities similar to what would have been available to them at home. (p. 13)

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Typically, the American-Sponsored Overseas School was founded by a small group of Americans residing in a foreign capital who wanted their children to have an American education. In the beginning, a rented apartment served as the school building and wives of U.S. government or corporate employees volunteered as teachers. As the size of the American community grew, it became necessary to hire U.S.-trained educators and import instructional materials.

Eventually, local citizens and members of the international community who desired an American-type education for their children began to apply for admission to these schools. This necessitated the integration of local curricula into the instructional program and recruiting and hiring local English-speaking teachers. Continued growth of these schools finally demanded the acquisition of property and construction of permanent school facilities in which full-time professional staffs were able to offer a quality educational program to children of U.S. citizens, host country citizens, and third country nationals.

General Characteristics of ASOS

Due to the individual circumstances of their founding, unique geographic situation, and wide variety in student enrollment and physical facilities, it is difficult to define or exactly describe a typical American-Sponsored Overseas School. There are, however, certain communalities which do occur that assist in describing these schools. Summarized from Mannino and Connor (1966), some of these communalities include:

1. The schools are privately controlled, nonprofit, and nonsectarian.
2. The schools are basically American or binational in character.
3. The schools are controlled by school boards drawn from the local parent group and composed of citizens of the local country and third counties in addition to Americans. (Third country denotes any country other than the United States and the host country.)
4. The schools are financed primarily through tuition payments, with additional minor support coming from a variety of other public and private sources.

5. The schools enroll children of Americans and other foreign nationals and, where permissible, children from the host country as well.
6. English is the primary language of instruction, supplemented in many cases with the language of the host country.
7. The curriculum and methods of instruction are based upon American patterns, with special attention to history and culture of the host country.
8. The administrators and most of the teachers are Americans or American-trained, with a large proportion of staff hired locally from qualified local personnel.
9. There is rapid turnover of personnel in nearly all schools, which tends to weaken stability and continuity in the school program.
10. The student body in nearly every school is constantly changing, thus further emphasizing instability.
11. Distance from the United States makes it difficult, time-consuming, and costly to obtain instructional materials and keep abreast of developments in American education.
12. Lack of funds and, in many instances, difficult living conditions make recruitment and retention of professional personnel from the United States difficult.
13. Small enrollments in many schools make it difficult and costly for schools to offer comprehensive school programs, and isolation from other ASOS almost precludes consolidation or cooperation in employing supervisors or specialists. (pp. 11-12)

ASOS in Latin America

The American-Sponsored American Schools in Latin America constitute the oldest and largest group of ASOS in any region of the world. Almost one half of the ASOS in Latin America were founded before 1950 and their enrollment represents 44% of the total world-wide ASOS enrollment (U.S. Department of State, 1987).

Perhaps the most distinguishing characteristic of the ASOS in Latin America is their binational character. Over 60% of the students and over 50% of the staff members in Latin American ASOS are citizens of the country in which the schools are located (Luebke, 1976). In spite of this difference, ASOS in Latin America still share most of the common characteristics with other ASOS located throughout the world (Orr & Kling, 1982).

Obstacles to Rational Planning in ASOS

Rational Models of Planning

For many years a wide variety of organizations have employed a rational approach to planning and decision making. This reliance on rational decision making continues to exert a strong influence on organizational planners and decision makers, and has even permeated the field of educational planning. The influence of rational planning systems on education has reached the point where, as Clark (1981) put it, "Traditional planning systems dominate the field of education from the development of national policy to planning within individual institutions" (p. 43.)

Since March and Simon's (1958) early work on the rational decision-making process in organizations, many variations on the central theme of rationality have appeared in the literature. All traditional rational models, however, espouse the setting of long-range goals, the generation of alternative strategies to attain those goals, the determination of probable future outcomes associated with each alternative strategy, and the selection of the one strategy which appears most likely to produce the desired outcome.

Changing Enrollment in ASOS

One of the trends among ASOS which has a profound effect on the ability to utilize long-range rational planning is the rapidly changing student population found in these schools. Of particular significance is the decline in enrollment of U.S. students in ASOS both world-wide and in Latin America. Although total enrollment in ASOS world-wide has increased 33% since the early 1970s, enrollment of U.S. students has dropped almost 29%. The U.S. dependent group has gone from being the single largest group in ASOS world-wide to being the smallest. Both host country and third country enrollment world-wide has continued to increase during this same period.

The Latin American ASOS have experienced a similar decline in enrollment of U.S. dependents. While the U.S. dependent group comprised about 30% of all enrollment during the early 1970s, they now constitute only 15%. Again, host and third country enrollment have both increased over this same period.

This continuing trend of changing enrollment certainly has implications for those board members and administrators who are charged with formulating and implementing long-range goals and objectives for their schools. Such long-range planning becomes very difficult when policy makers must continually reconsider their basic mission of providing an American-type education.

In their attack on rational planning, Cohen, March, and Olsen (1972) described three characteristics of organized anarchies. Regarding the first characteristic, problematic preference, they stated:

> The organization operates on the basis of a variety of inconsistent and ill-defined preferences. It can be described better as a loose collection of ideas than as a coherent structure; it discovers preference through action more than it acts on the basis of preferences. (p. 1)

The characteristic of problematic preference appears particularly relevant to decisions faced by ASOS regarding the very purpose for their existence.

Personnel Turnover in ASOS

A second characteristic of American-Sponsored Overseas Schools which has a profound effect on their ability to plan rationally is the high incidence of turnover among personnel, particularly administrators and board members. Numerous studies (Roth, 1973; Mandrell, 1980; Vargas, 1980) have found that chief administrators in Latin American ASOS rarely remain in office long enough to implement long-range goals or plans. P.G. Orr (1976) determined the average term of ASOS board members to be only 1.9 years, and concluded that:

> There is sufficient evidence to support the conclusion that turn-over of board members is of a magnitude that continuity of school development cannot be assured by continuity of leadership of long-term board members. (p. 13)

A second obstacle to rational planning postulated by Cohen, March, and Olsen (1972) is fluid participation, in which "... the audiences and decision makers for any particular kind of choice changes capriciously (p. 1). Fluid participation certainly appears to characterize the situation in most ASOS, and further limits any attempts at long-range rational planning.

Autonomy of ASOS

Another factor which complicates the planning process of American-Sponsored Overseas Schools is the high degree of independence or autonomy enjoyed by each individual ASOS. In reference to ASOS in Mexico, P. Orr, Jr. (1983) wrote:

> Each of these schools has relative autonomy to determine its own philosophy and set its own operational practices. This autonomy is reported to exist because these schools are relatively free from control by the U.S. government or from the host-country in which they operate. (p. 15)

Although this autonomy permits each ASOS flexibility in responding to the specific needs of its own constituents, the lack of centralized planning and sharing of ideas and resources forces each school to fend for itself in the planning arena. This results in a situation which Orr and Seaquist (1968) summarized in the following manner:

> American school superintendents and board members in Latin America thus have to do not only a more difficult job of planning, but have less formal or professional control, guidance, and regulation to assist them. (pp. 14-15)

The third property of organized anarchies described by Cohen, March and Olsen (1972), which appears relevant in light of the preceding discussion, is unclear technology. Without the ability to share ideas and learn from the past experiences of others, most ASOS share the property of unclear technology in that they "operate on the basis of simple trial-and-error procedures, the residue of learning from the accidents of past experience, and pragmatic inventions of necessity (Cohen, March, & Olsen, 1972, p. 1).

Funding Patterns in ASOS

The final characteristic common to most American-Sponsored Overseas Schools which affects their ability to utilize traditional rational planning is the means by which these schools procure funding for their ongoing operations. As Luebke (1976) wrote:

> The schools are supported principally from tuition payments of students enrolled, with only a small portion deriving from grants provided by the Office of Overseas School or from other sources. In 1975, for

> example, the combined budgets of all 140 schools receiving assistance totalled more than $85 million; of this amount, grants-in-aid from the U.S. government represented only about five percent. (p. 30)

Unlike most public schools or Department of Defense Dependent Schools, in which availability of funding and resources is fairly consistent and predictable, annual funding for many ASOS is neither consistent nor highly predictable. Changing enrollments and fluctuations in foreign currency exchange rates limit most schools' ability to accurately predict the total amount of resources available to them from one year to the next (or, in some cases, one month to the next). As rational planning requires the ability to link available resources to selection of alternative strategies, many ASOS experience severe limitations on their ability to plan in the traditional rational sense.

The Need for Planning in ASOS

American-type schools have a unique opportunity to provide good educations for the children who attend them. However, each school's ability to take advantage of this opportunity is limited by a number of voids in their planning base. The most serious of these voids includes (1) lack of information about the relative status of the school, (2) lack of clear direction concerning what a school seeks accomplish, and (3) lack of a designed strategy to get the school from where it is to where it wants to be (Orr & Seaquist, 1968, p. 13).

Due to the high proportion of Latin American ASOS which engage in planning without purpose and/or adequate facts and data, Orr & Seaquist (1968) recommended that these schools adopt a more ration systems analysis approach. Although this approach does have merit, it implies that the schools must be able to gather all of the information needed to make informed judgements and measure these judgements against predetermined long-range goals and objectives. At the present time, however, it is questionable how many of these schools are in a position to either acquire this needed information or set long-range goals with any certainty.

A Planning Model for ASOS in Latin America

The concluding section of this paper will examine the applicability of several major planning models to the problems faced by American-Sponsored Overseas Schools in Latin America. Although many ASOS world-wide face similar planning problems, the pending evolution of many Latin American ASOS into schools offering a host-country-type education using English as the medium of instruction makes their planning dilemma even more acute.

Bounded Rationality

It is apparent from the information presented so far that a traditional comprehensive rational model of planning is out of the question for almost every ASOS in Latin America. Rapidly changing enrollment patterns, lack of sufficient information, high turnover among administrative personnel, and uncertainty in continued availability of sufficient funding precludes the possibility of an exhaustive search for viable alternative solutions inherent in a comprehensive rational model.

A more plausible approach to rational planning might be the bounded rational model proposed by March and Simon (1958). This model requires a less exhaustive search for viable alternatives and allows decision making based upon a more limited base of information. Undoubtedly, those few ASOS in Latin America which have the requisite organizational structure and stability could take advantage of a bounded rational approach to planning and decision making.

However, the majority of ASOS in Latin America are not presently in a position to effectively utilize any system which relies upon rational decision making. Even the less stringent assumptions associated with a bounded form of rationality pose a considerable problem for these institutions. Any form of reliable long-range planning would be severely hampered by the rapid turnover of administrators and changing complexion of the student bodies in these schools. Coupled with their uncertain financial futures, these ASOS would be ill-advised to attempt planning and implementing programs which would require several years to reach fruition. A more feasible approach would be to

consider using a planning model which is better suited to their particular needs and provides a greater deal of flexibility.

Disjointed Incrementalism

One such less demanding model of decision making is embodied in the strategy of disjointed incrementalism first proposed by Lindblom (1959). Disjointed incrementalism attempts to adapt decision-making strategies to the limited cognitive capabilities of decision makers and reduce the scope and cost of collecting and analyzing information.

The basic problem with the incrementalist approach is that it fails to provide even a modicum of direction or continuity. Without some degree of direction or continuity, many ASOS in Latin America would experience an abrupt change every time a new administrator or board member took office (which, as has been discussed, is quite frequent).

It is the ongoing need for continuity and general direction among ASOS in Latin America which a disjointed incremental approach is unable to satisfy. A more appropriate solution would be a model which incorporates the ability to provide continuity and basic direction, while also providing the needed flexibility for decision making on an incremental basis to satisfy short-term needs as they arise. Etzioni (1967) appears to have had such a system in mind when he said:

> Thus, while actors make both kinds of decisions, the number and role of fundamental decisions are significantly greater than the incrementalists state, and when the fundamental ones are missing, incremental decision-making amounts to drifting--action without direction. A more active approach to societal decision-making requires two sets of mechanisms: (a) higher-order, fundamental policy-making processes which set basic directions and (b) incremental processes which prepare for fundamental decisions and works them out after they have been reached. This is provided by mixed-scanning. (p. 388)

Environmental-Scanning

The environmental- or mixed-scanning approach (Etzioni, 1967) combines elements of both the bounded rationalistic and incremental models in a manner which maximizes the usefulness of both in varying situations. Etzioni (1967) explained that "The strategy combines a detailed ("rationalistic") examination of

some sectors--which, unlike the exhaustive examination of the entire area, is feasible--with a "truncated" review of other sectors" (p. 389).

Based upon the particular characteristics of ASOS in Latin America described earlier, this author believes that the environmental-scanning approach represents the one "best" model for planning and decision making for those schools. The need for continuity and basic direction would provide a specific focus for each school to invest the resources to develop longer-range plans, without having to do so for all possible contingencies. Much of the time and resources saved by limiting the scope of rationalistic planning could be diverted to meeting immediate needs which constantly arise in the rapidly changing environments found in most ASOS.

Another aspect of environmental-scanning which lends itself to use by ASOS in Latin America is the ability of each school to determine what proportions of rationalistic and incremental planning are optimal for its own situation. The wide variation in developmental level of each particular ASOS in Latin America makes this ability an essential component in any useful planning model.

In summary, of all the major planning models considered, Etzioni's environmental-scanning approach appears to hold the greatest potential benefit for most American-Sponsored Overseas Schools in Latin America. By avoiding rigid adherence to either the traditional rational models or the piecemeal incremental model, environmental-scanning provides the needed ability to provide continuity and basic direction without eliminating the flexibility of being able to deal with rapidly changing conditions within the school.

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